The City of SAN DIEGO

User Registration

You will learn:

- **How to register your organization in ED Grants and obtain login credentials**
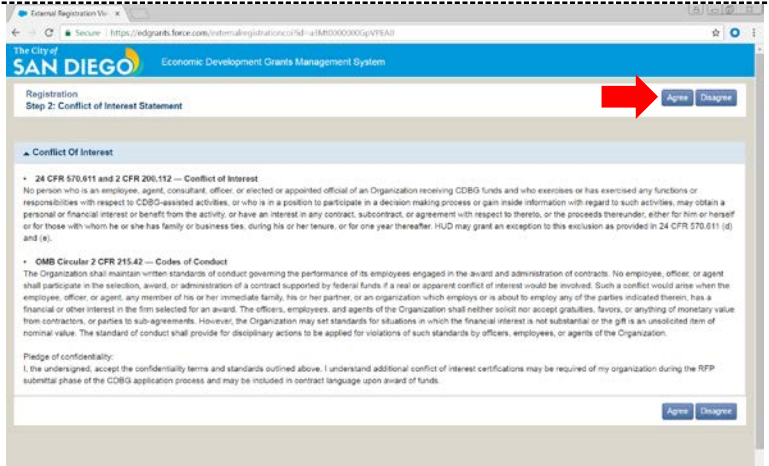
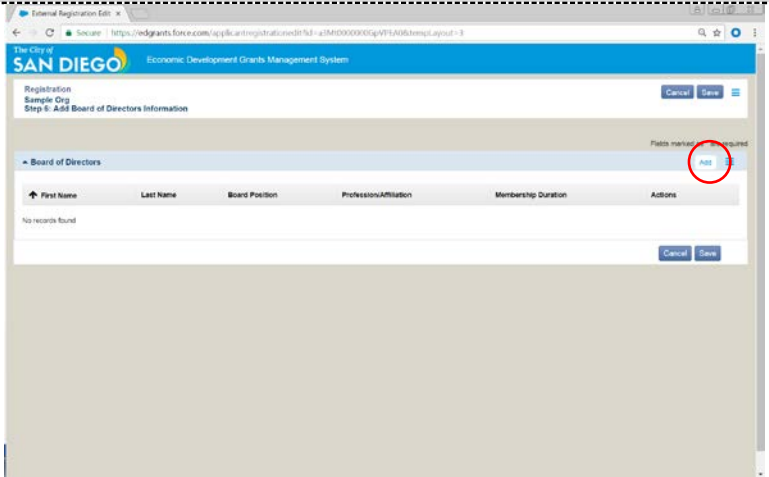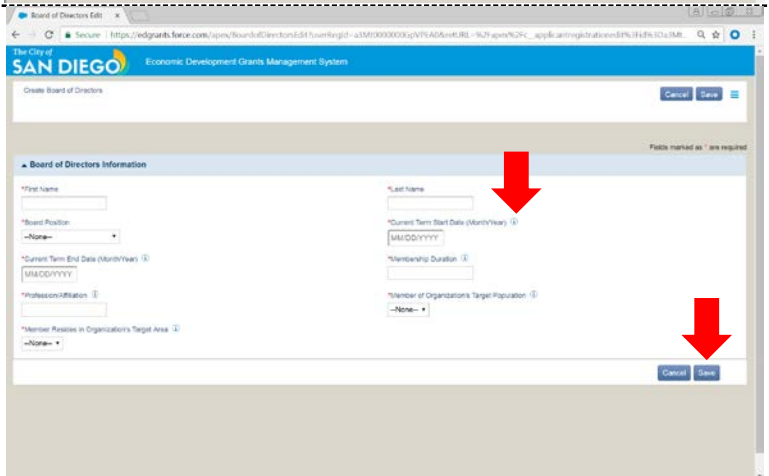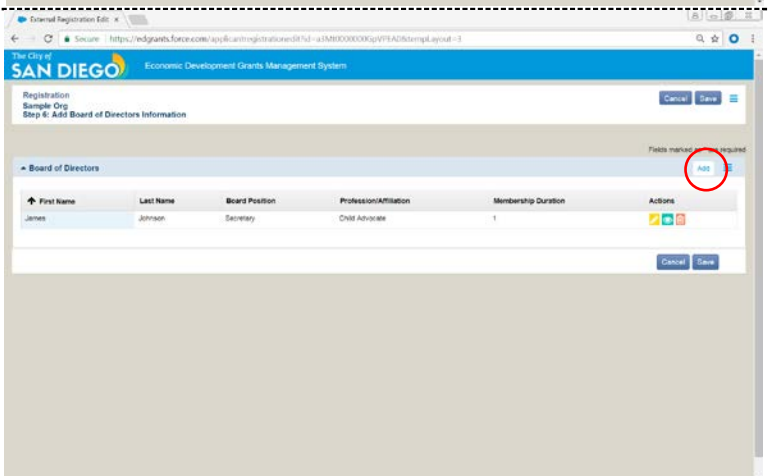| Step	Description	Screenshot
1	Navigate to http://edgrants.force.com and click on the '**Register As**' button. Select '**Organization**' from the dropdown menu. ***NOTE:*** *ED Grants is optimized to function using the Google Chrome browser.*	
2	Read the '**Non-Disclosure Agreement**' and click on the '**Agree**' button. ***NOTE****: Clicking on the 'Disagree' button will return you to the login page and preclude you from registering your organization.*	
3	Read the '**Conflict of Interest**' language and pledge of confidentiality language. Click on the '**Agree**' button. ***NOTE****: Clicking on the 'Disagree' button will return you to the login page and preclude you from registering your organization.*	

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4	Populate the required fields regarding basic information on your organization (i.e., EIN number, Unique Entity ID number, organization name, RFP types interested in), using the help text icons (ⓘ) for guidance and clarification. After you are finished, click on the '**Next**' button.	
5	You should now see a form with four sections: '**Organization Information**,' '**Organization Address**,' and '**Organization Head Information**.' Populate the required fields, using the help text icons (ⓘ) for guidance and clarification. After you are finished, click on the '**Save**' button. ***NOTE****: Make sure all the information is correct as it will be used in future agreements with the City should your organization be awarded CDBG funding.*	
6	You should now see sections to enter your organization's Primary Representative and Secondary Representative(s). Populate the required fields, using the help text icons (ⓘ) for guidance and clarification. After you are finished, click on the '**Save**' button. ***NOTE****: Read the definitions of the terms located near the top of the screen. It is very important to enter the correct Primary Representative who has the authority to legally and contractually bind your organization and certify submissions to the City of San Diego. Only this person will have the functionality in ED Grants to sign agreements and certify and officially submit required documents and responses. Each organization must have both a Primary and Secondary Representative each with a distinct email address.*	

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Step	Description	Screenshot
7	You will now enter information on your organization's board of directors. Click on the '**Add**' button to open a page where the profile of one board member may be entered.	
8	Fill out the fields on the page, using the help text icons provided (ⓘ) for guidance and clarification. When you are finished, click on the '**Save**' button.	
9	Repeat steps 7–8 above for each board member until all members have been entered. *NOTE: Although not recommended, you may choose to skip filling out the '**Board of Directors**' tab during registration. If you do decide to skip, later on, you will be asked to provide this information. Failure to fill out the '**Board of Directors**' tab will preclude your organization from submitting RFQ responses or project proposals.*	

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Step	Description	Screenshot
10	To edit a board member profile previously entered, click on the '**Board of Directors**' tab and one of the icons in the '**Actions**' column. The trash can icon (🗑) deletes the entire existing profile from the system. The pencil icon (✏) opens the profile for editing, after which the '**Save**' button should be clicked to preserve the changes. The eyeball icon (👁) opens the profile for viewing only. When you are finished entering all the board members, click on the '**Save**' button.	
11	Examine the CAPTCHA challenge and type the number, word, or phrase you see in the text box. If you are not able to solve the CAPTCHA challenge, click on the reload button to get a new CAPTCHA image. If you are having difficulty reading the image, click on the audio (speaker) icon to hear the number, word, or phrase. Click on the '**Submit**' button to finish the registration and submit your organization's information to the City for review and approval.	
12	After your registration has been submitted, City staff will review it and either approve or reject the registration. If your organization's registration is approved, the Primary Representative and Secondary Representative(s) will receive an email from ED Grants directing them to set up their own login credentials (username and password) in accordance specified criteria. Login credentials must be set up within 24 hours of receipt of the email; if more than 24 hours lapses, the credential setup link will expire, and the representative will need to contact City staff to have the setup link reset.	**End**

For additional support, email CDBG@sandiego.gov or visit the 'Resources' tab at edgrants.force.com.